



# OFFICE 365 MIGRATION

Date: June 16, 2015

*Statement of Work  
for State of Kansas*

**AOS**  
*Expect the Best!*



## Statement of Work

This Statement of Work covers professional services work AOS will perform for State of Kansas. Beginning on a mutually agreed upon date, AOS will provide one or more qualified technical consultants and/or Project Management personnel on a Fixed Fee basis.

AOS will consider additional work not explicitly stated in this Statement of Work as “out-of-scope” and will require a “change order”.

## Summary

This statement of work is meant to show a high level approach to implementing and migrating data to Office 365. This document is a high level view of project scoping tasks.

AOS is proposing Microsoft Office 365 with Plan E2 for Government (G2). On premise ADFS (Active Directory Federation Services) servers will be installed in the new “OITS” forest to facilitate single sign on capabilities with Office 365. Also using AAD Connect for password synchronization to Office 365. AOS is recommending installing an Exchange 2013 server in each agency forest in a hybrid deployment; to facilitate Exchange mailbox moves to Office 365 and synchronize AD policies with Office 365. Non-Exchange email environments will either need to be migrated manually or with 3rd party migration tools which will be determined based on discovery of the systems. AOS will be responsible for migrating defined archive data (costs for third party tools needed for archive migration will be the responsibility of the State of Kansas)

Unified Communications data migration requirements for Lync Online will be detailed after the envisioning phase of this project.

AOS will provide two resources on site, remotely, or a combination of both to conduct the work for this project. There will be a Systems Consultant (engineering lead), Senior Systems Engineer, and Project Manager. It is the expectation that the State of Kansas will provide one or more systems administrators with general knowledge and administrator access to all agency IT environments. The State of Kansas resources need to be available at all times during the project with at least one resource being dedicated to facilitate escalation, knowledge requests, and decisions made by the state.

## Scope and Approach

Experienced AOS personnel, or authorized agents, will perform the following implementation tasks:

### Office365 Envisioning

AOS will complete the following design tasks for Microsoft Exchange 2013.

- Perform Active Directory Discovery
- Perform Email Discovery
- Perform Instant Messaging Environment Discovery
- Perform Document and Collaboration Discovery
- Review Current SPAM Design
- Review 3<sup>rd</sup> party integration into current environments including email archiving
- Document Current Mail Flow
- Conduct Review of Current Discovery Data
- Conduct Design Session with the State of Kansas
- Create New Design Diagram
  - Namespace Planning
  - Bandwidth Considerations
  - IP Map
  - Visio Design
  - Mail Flow
  - Federation requirements
  - Migration methodologies
  - Executive Summary
  - Hardware Requirements
  - Virtualization Requirements
  - Special Considerations
- Review and Sign off of Design (Phase Review)

#### Documentation Deliverables

- Discovery Recommendations
- Proposed Design
- Phase Sign off documentation
- Change order Requests (if needed)

#### ADFS/SSO and Directory Synch Implementation

- Subscribe to Office 365 and enable services
- Create trusts between the "OITS" Active Directory Forest and the other agency forests
- Implement ADFS (Active Directory Federation Services) servers in the "OITS" and "CJIS" Active Directory Forest(s)
- Request and Deploy SSL certificate on ALL ADFS Servers.
- Build & Implement ADFS/SSO Architecture.
- Microsoft Deployment Readiness Tool to capture and fix operational challenges in prerequisites.

- Build VM for ADFS and ADFS Proxy Servers and join them to the domain.
- Deploy ADFS (Network) Servers on NLB and ADFS Proxy Servers
- Configure Load Balancers for micro-soft mail flow – Additional appliance configuration will be configured out of scope of this project.
- Configure Hybrid Configuration wizard on Exchange 2013 servers.
- Configure relay connector on hybrid
- Change virtual directories
- Setup Firewall Exceptions for Coexistence
- Configure UPNs
- Configure SQL Clustered Backend for AAD Connect Server
- Configure AAD Connect Server
  - AAD connect installation and standard configuration is to include all users in the domain from the root. If there are other filtering requirements based on attributes, groups, or OU's then a Change Order will need to be completed.
- Configure/ADD DNS ADFS domain name spaces
- Create Office 365 on and off premise service account
- AOS will perform the following configuration in the State of Kansas Office365 Tenant:
  - Mailflow to include the following:
    - Inbound/outbound SMTP traffic
    - SMTP relays from on premise to Office365
    - Client Access configuration to include the following
      - Web connectivity (OWA/ActiveSync/OAB/Outlook Anywhere)
      - Internal and External DNS records required for Office365 Connectivity
      - Configure certificates
      - Enable AD Sync and license users for Office365
- Any additional configuration outside of the standard Office365 functionality such as the following will be consider outside of scope:
  - Address book segregation
  - SPAM filter customization
  - Two-Factor Authentication
  - Discovery Segregation
  - Firewall configurations
- Implement 3<sup>rd</sup> party tools for Archive data migration
- Configure Office 365 mail archiving
- Test Archive migrations



### Email Migration to Exchange

- Build Exchange 2013 server(s) in hybrid mode to facilitate mailbox moves to Office 365 OR use an existing Multi-role Exchange 2013 server
- Test Exchange Client Access and Web Services OWA, EAS, OA, ECP, OAB.
- Implementation and testing of any 3<sup>rd</sup> party tools required to facilitate the migration of mail data
- Test mailbox migrations to cloud
- Create Migration batches as specified by the State Agency which is getting migrated
  - Migration batches need to be at least 100 users per batch that can be migrated simultaneously.
- Perform initial synchronization of each batch
- Fix any operational move errors as applicable.
- Finalize migration batches as coordinated by each agencies IT staff
- Migrate archive mail using 3<sup>rd</sup> party or Microsoft tools to Office 365

NOTE: Exchange 2003 and non-Exchange mail environments may require the purchase of 3<sup>rd</sup> party tools to migrate to Office 365. If PST ingestion is required the no cost Exchange PST capture tool can be used to ingest PSTs in an automated fashion (The State of Kansas will be responsible for this ingestion if needed).

### Unified Communications Migration to Lync

- DNS configuration for Lync Online
- Testing and verification of mobile apps and Lync client functionality
- Configuration of Federation

Note: it was not clear in the RFP response questions whether migration of user contacts or other data being used in current Unified Communication products is required. A final migration plan will be created after the envisioning phase based on the State's Unified Communications migration requirements.

### Office 365 Training

- Up to 24 hours of knowledge transfer will be provided by an AOS consultant for designated O365 admins. Typically this is enough training to administer Office 365 based on previous client experience. However, knowledge transfer is not a supplement for professional training or certification and AOS recommends anyone administering the environment to also take formal training by certified trainers.

## State of Kansas Project Responsibilities

- All certificates, 3<sup>rd</sup> party migration tools, licensing, hardware and software costs are the responsibility of the State of Kansas.
- Obtaining Load Balancers as requested to support mail flow as described in the design Visio.
- Communication with agency and end-users with regards to the project schedule and requirements.
- Obtaining any required certificates
- Decommission of existing 3<sup>rd</sup> party environments is the responsibility of the State of Kansas

***Any work not specifically included in this Statement of Work is considered EXCLUDED and outside the scope of this project. This work will be documented using the AOS change order process or will be documented in another Statement of Work for AOS professional services.***

## Customer Responsibilities

In addition to any work tasks assigned to the client above in this Statement of Work, the Client agrees to the following preparations for this project:

- Customer is responsible for ensuring that a full backup of systems and data is performed prior to upgrade process. Failure to do this can result in data loss and is not a part of the statement of work to restore data.
- Ensure that proper power is available, any necessary rack space has been allocated and proper environmental requirements are met for any new equipment installations prior to the consultant arriving on site. Failure to provide proper environmental conditions could void server/appliance factory warranties or, may result in a Change Management request and appropriate cost adjustments.
- Customer must designate a minimum of two (2) staff members to serve as primary and secondary contacts for the duration of this project. Please see "Contacts and Resources" section within this Statement of Work.
- Customer is responsible for allowing AOS to access facilities during normal business hours from 8 AM – 5 PM, Monday – Friday. Any scheduling outside of normal business hours must be coordinated through project's designated contact(s) with one week advanced notice, (based upon availability) to allow for resource schedule coordination and procurement.
- Have any required existing server/host hardware and supported Operating Systems in good health with required service packs and/or patches applied prior to the consultant arriving on site. Systems requiring additional updates not specified in this Statement of Work will be out-of-scope and require a change form be completed.



- Provide an adequate workspace for AOS on site personnel with network connections to the Internet and customer's network as required including parking, phone, necessary network connection information, IP addressing, proxy account information, etc. while satisfying customer Security Policy requirements. (Note: In preparation of conversion to virtual machines run defragmentation and disk clean up on target servers)
- Provide remote access connectivity as required to assist in the completion of this statement of work. (Assumes compliance with existing customer security policy.)
- Have customer personnel available during implementation window to provide any required assistance and/or facilitate necessary communications to accomplish the required work.

## Contacts and Resources

AOS will perform work at the following location(s):

Location	Contact
900 SW Jackson, Rm 751S, Topeka, KS	Travis Combes

## Project Contacts

Name	Position/Company	Project Role
Travis Combes Travis.combes@ks.gov Ph: 785-296-4004	Cloud Services Director	Project Primary Contact
Mit Winter mit.winter@aos5.com Ph: 913-302-2300	Account Manager Alexander Open Systems	Primary AOS Sales Contact
Jeff Durfee jeff.durfee@aos5.com Ph: 913-744-3225	Design Architect Alexander Open Systems	Technical AOS Sales Contact
AOS Scheduling scheduling-kc@aos5.com Ph: (913) 307-2330	Alexander Open Systems	AOS Engineer Scheduling

## Consulting Fees

The following table lists the costs for a Fixed Fee engagement. Shipping and taxes are not included. All prices are in U.S. dollars. See Pricing Assumptions below for additional information.

Description	Fixed Fee
<b>Total Services</b>	<b>\$[Price]</b>

### Pricing Assumptions

- Unless otherwise identified within the scope or service brief, AOS bills travel one way to the customer site from the nearest AOS Office within that region at the identified engineer hourly rates.
- Except for the cutover(s) specified in this SOW, AOS will perform work during normally scheduled working hours (8:00 A.M. to 5:00 P.M. local time Monday through Friday), excluding AOS \ customer observed holidays. AOS will charge any work performed outside of these normal business hours at the rates shown below:
  - Overtime & Weekends billed at Normal Business Hours (NBH) + 50%
  - Holidays billed at Normal Business Hours (NBH) + 100% w/ (2) hour minimum
  - Emergency support billed at Normal Business Hours (NBH) + 50% w/ (2) hour minimum
- AOS will assess a cancellation fee of \$200 for scheduled work customer cancellations with less than 24 hour advanced notification. Notification of cancellations can be made to any of the contacts listed in the Contacts and Resources section.
- AOS sales and services are subject to any applicable AOS Master Services Agreement.
- State of Kansas hereby assumes all costs associated with said requested services. Associated costs include, but are not limited to, those that are set by AOS under this Statement of Work. AOS agrees to obtain approval by State of Kansas prior to incurring any costs in addition to those already itemized on this Statement of Work and the purchase order provided to AOS prior to the services being done.
- Typically, AOS will use local resources that will not require any travel expenses, assuming the work site is within an AOS office's local work area. In the event AOS needs a non-local resource, AOS will obtain prior written approval before incurring any travel charges. State of Kansas will reimburse AOS for reasonable expenses incurred in connection with our performance of the Services, if any are required, including travel expenses, lodging, meals, parking fees, copying charges, delivery charges, postage, telephone charges and other related expenses.
- Payment of the net amount of an invoice is due 30 days from the date of AOS invoice, unless otherwise specified in this Statement of Work. All Pricing is subject to Other Terms



and Conditions attached hereto and incorporated by this reference herein. Refer to Master Services Agreement for further information.

- All applicable state and local taxes, shipping charges (FOB customer dock), travel and associated expenses will be added to invoice.

### Other Terms and Conditions

- AOS is not responsible for configuration, compatibility, or products requested per customer-provided specifications. AOS has professional design consulting services available to quote upon request.
- AOS will coordinate the ordering, delivery, warranties, and maintenance agreements of all equipment and software components listed that are purchased through AOS.
- Customer is responsible for returning all trade-in merchandise to the designated parties or issue a certificate of destruction if that is required. AOS will charge for equipment not returned.
- AOS will subject additional delays or communication coordination with 3rd party providers, (Telco's, local ISP's, remote vendors, etc.) not reflected in this Statement of Work to a Change Management Form request.
- Customer must pay block contracts in full prior to receiving the discounted rate on work. AOS subjects Fixed Fee and Hourly services to progress billing at the end of each AOS monthly billing cycle.
- Customer agrees not to solicit or pursue for employment any AOS personnel. Each party agrees not to hire or solicit for employment (or as an individual independent contractor) any employee of the other party until twelve (12) months after the date such person terminates employment with the other party. AOS further agrees not to hire or solicit for employment (or as an individual independent contractor) any other individual while he or she is performing services for Customer pursuant to a contract. If this paragraph is breached by the hiring of an employee of AOS, damages for such breach are agreed to be equal to the demonstrated cost of training a replacement for such individual. This paragraph does not apply to the hiring or solicitation of any individual who did not become known to the hiring or soliciting party as a result of the relationship between Customer and AOS created by this Agreement.
- AOS will only process orders signed by an agent of the company. AOS will require a purchase order if required by Customer's organization.
- This Statement of Work does not imply or guarantee a specific date or time frame for services to begin. All project timelines will be mutually agreed to by and between Customer and AOS.

### Customer Acceptance

Due to the competitive confidentiality of information provided the accompanying materials, AOS and State of Kansas shall, to the extent required by law, keep all such information in the strictest confidence and shall not be divulged to persons other than State of Kansas employees unless authorized by AOS. AOS bases the recommendations for equipment, programs and services on information customer has furnished to AOS and on observations by AOS. While AOS believes the price and materials list to be sound, the degrees of success with which equipment, applications and services are applied to information, processing is dependent on many factors, some of which are beyond the reasonable control of AOS.

The signature below affirms and acknowledges that you have read the above contents in its entirety and agree to the terms and conditions of this proposal as outlined.

**Accepted State of Kansas by:**

Name (Print): DONNA R. SHELITE Title: CHIEF OF STAFF  
Signature: [Signature] Date: 6/19/15

**Accepted for Alexander Open Systems by:**

Name (Print): Jeff Tindell Title: Vice President Sales  
Signature: [Signature] Date: 06/18/15